# E-Proposal

E-Proposal is a process of publishing proposal documents electronically versus paper. MDOT has worked in an electronic environment for many years producing documents created in word processors, spreadsheets, databases for produced reports, and complex plans using Microstation and other sophisticated engineering software. But the outcome of each of these creations has usually been to print a paper copy. The methods used to create documents has changed significantly but "what happens after" hasn't stayed up with technology

First let's look at the current life cycle of a set of plans:

- An "intelligent" file is created in Microstation.
- The file is printed to paper/mylar.
- The paper/mylar is then scanned to produce a "dummy" file which is distributed. (As-Let Plans)
- Multiple paper copies are produced and distributed throughout the state to internal customers at a significant cost for printing, supplies and mailing.
- After letting, the original plans are stored at a significant cost for storage facility.
- Plans are updated, sometimes using the paper copy to make the changes.
- Plans are microfilmed again into a "dummy" file (As-Built Plans)
- Paper/mylar is destroyed.
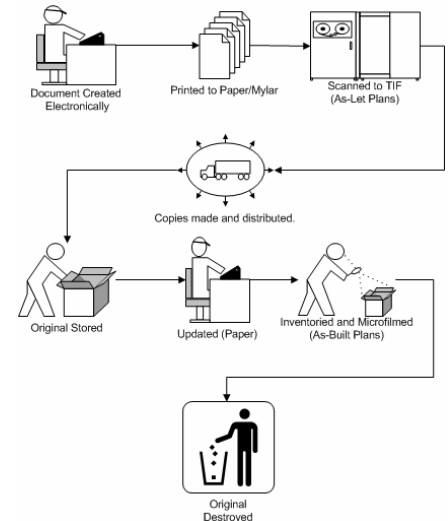
Several Benefits of creating electronic documents are:

Reduced Paper/Printing Cost – no mylars	Better security/accuracy (no missing paper)
Reduced Mailing Cost	Time savings (file transmission and receipt)
Reduced Storage Cost	Ease of making corrections
Easier Access to MDOT files	Better use of Information Technology
Reduced physical labor to "Deliver plans"	Timelier reviews for contractors
Better communication	Faster more accurate information for contractors
Better management of historical documents	Lower costs for consultants and contractors

E-Proposal uses the following software tools to accomplish the objective:

ProjectWise - Repository for access to and publishing of plans, proposals and supporting documents.   NOTE: It is anticipated that web access will be available for consultants to directly deposit files into ProjectWise. Future information will be made when available.

**Adobe Acrobat Professional** – Currently Version 6.0 – One program that gives us easy solutions for:

- Fast and easy PDF document creation,
- Intuitive combining and organizing of multiple files
- Electronic signatures for required forms
- Bookmarking files for easier access
- Commenting to locate missing information.

Microstation v8 and IPlot Organizer – Provides a method to plot or re-plot entire drawing sets in a single step to PDF format with intelligence retained on plotted levels (when combined with Microstation v8). (NOTE: Files MUST BE converted to Microstation v8 prior to Plotting to retain intelligence– levels can remain with the Microstation J format and DO NOT need to be converted.)

Getting Started on an E-Proposal Project

Converting Proposal documents to Adobe PDF:
These are the same documents that you currently are required to turn in when completing a job. The only difference is that instead of printing each of them to paper you will be printing them to Adobe PDF.

Most programs such as Word, Excel, PowerPoint, GroupWise and web reports are integrated with Adobe so it's only a matter of selecting the Adobe PDF printer or macro located within the program.
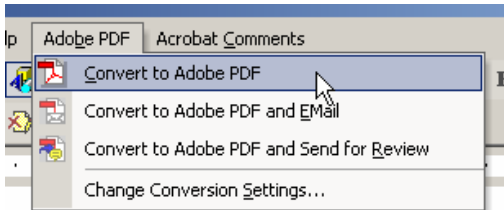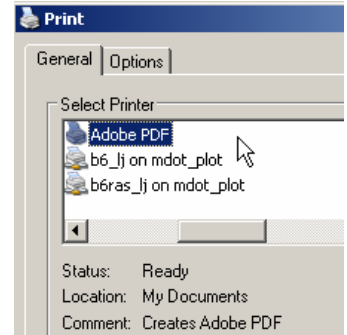

(If missing in Word, click on Tools, Templates & Add-Ins, Global Templates and add-Ins, check the PDFMaker.dot box.)

File, Print and selecting the ADOBE PDF printer will achieve the same results.

Some web applications like the SS/SP program produce a report and then display it in a integrated Adobe viewer so only a Save a Copy is required.

Documents which are unavailable for direct conversion can be scanned and included into the proposal although this results in a significantly larger file size and does not provide full-text search capabilities. Files which would be acceptable as scanned documents include Permits, handmade drawings, etc.   Files should be scanned in black and white, using a binary format if possible and a DPI no larger than 300.

Creating Microstation plans to Adobe PDF:
- **Microstation v8 MUST** be used to create PDF's of the DGN's. Because Microstation v8 has integrated itself with Adobe, it is able to capture level display and full-text search capabilities within a set of plans. Searching within the entire plan set on quantities, a particular pay item, or any other word is possible.
- Files previously created with Microstation Version J can be easily batch converted to Microstation v8 and plotted.   Levels will retain the Microstation Version J format and do not need to be remapped to the new v8 level convention.
- MDOT uses a third-party software to generate plots: Interplot Organizer for Microstation v8. *Reference document: Interplot Organizer for Microstation v8.pdf is available for your use as applicable.*
- Microstation Printing/Plotting (Batch Printing) can also be used for this purpose. *A download file of Bentley plot drivers (.plt) for producing PDF files is available from the MDOT File Library, CAD_v8, Print_to_PDF.zip.*   This file includes 24"x36", 11"x17" and letter sizes customized for MDOT line styles and line weights, both color and monochrome, and with/without levels and searchable text options.

Organizing Eprop Files on a CD (for transfer to PW)

Folder Structure and Intent - Creating your file structure to match MDOT's
ProjectWise repository will enable the Project Manager to easily integrate
your files into the system. The directory structure and intent of use is as
follows:
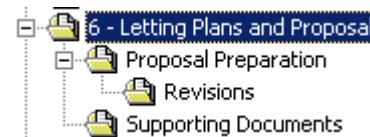
6- Letting Plans and Proposals –
This folder will normally only contain one file or three files (named in bold) at time of turn-in:
- **PROPOSAL.PDF** – Compiled document of all files that are published in a proposal.
- **PLANHALF.PDF** AND **PLANFULL.PDF** (if plans required) - Entire set of design drawings plotted to
  a single file.   NOTE: Large files must be broke down into more manageable file sizes and given
  standard file name. *Refer to E-Proposal reference document attached: E-Prop-How to Divide Large
  Projects.PDF*

Proposal Preparation Subfolder –
- It is a working folder and should contain all the individual final documents
  that you will later use to create a proposal. Should also contain the
  original DGN files for all plans submitted.
- Name files distinctively so that when you combine them later using Adobe
  you can pick out each one and place them in the correct order.
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Supporting Documents –
- Contains all the supporting information, required by S&E, that is turned in
  with the project but doesn't get inserted into the proposal.
- Do not compile together – leave each file separate.
- Include the following and name it distinctively so that S&E can find them.
  NOTE: This list is not exclusive and supporting documents can include additional documents in support of
  unique features of this project.

Required Supporting Documents	Naming Convention in Supporting Folder
Form 0265, 0253, 0301 – Certification Acceptance	JobNo-FormNo.-Certification Acceptance
Form 0269 – Submission of Final Plan/Proposal Package to Specs & Estimates	JobNo-0269-SE Submission
Form 256 - Advertising Data Sheet	JobNo-256-Advertising
Form 2911 – Structure Lump Sum Items Worksheet	JobNo-2911-StructureWorksheet
ROW Certification	JobNo-ROW Certification
SS/SP Checklists (separate from actual documents)	JobNo-SSChecklist or JobNo-SPChecklist
Trnsport - Bid Based Price Report	JobNo-Bid Based Price
Trnsport – Cost Summary by Proposal	JobNo-Cost Summary
Trnsport Web Report – Duplicate Items	JobNo – Duplicate Items
Trnsport Web Report – Decimal Report	JobNo - Decimal
Final QA/QC Checklist	JobNo – QA Checklist

**Combining and organizing files into one document -**
Now the files are ready to combine in the Proposal Submission Order (See PROPOSAL SUBMISSION ORDER handout – last sheet of this document).

1. Before starting, obtain a copy of the **Table of Contents-Template.pdf**   NOTE: You will use this to set up standard bookmarks for the published file.
2. Open Adobe Acrobat Professional
3. Click on File, Create PDF, From Multiple Files
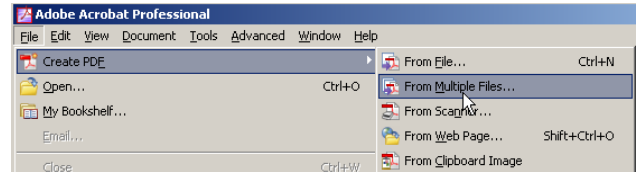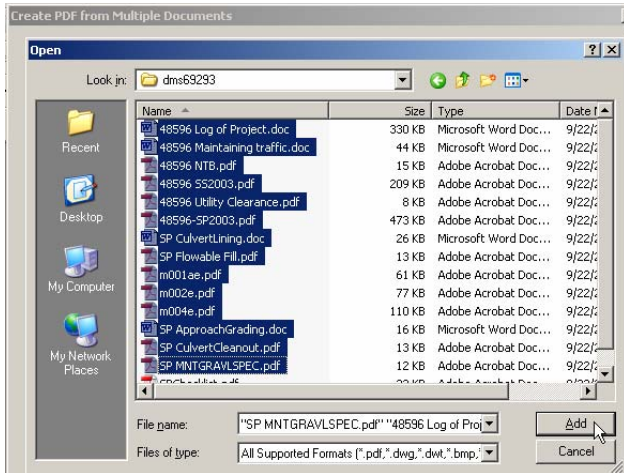
4. Browse to the folder contains your files.
5. Select the files you want to include in your proposal from the list: Hold Shift- First File, Last File to select a group, or Hold Ctrl – Click on each file. Click on Add. NOTE: This can include PDF and Word documents as Adobe will perform an on-the fly conversion to all files. DO NOT Include DGN files- it won't work.

6. In the "Create PDF from Multiple Documents" dialog box, **start with the Table of Contents-Template and then arrange the documents in the "PROPOSAL SUBMISSION ORDER"** as outlined by Specifications and Estimates and included as the last page of this document. Highlight the file and use the Move Up/Move Down to position or drag and drop.
7. If additional files are needed, click on the Browse button and select the required documents. Once files are in the right order, click on OK to build the PDF file.
8. Files will be combined together and opened up as one continuous PDF file. NOTE: You can also combine .DOC documents along with .PDF but this may take considerable time if it also has to convert them on the fly – be patient !!!
9. The file will come up in Adobe by default as BINDER1.PDF. Click on File, Save As, name it PROPOSAL.PDF.
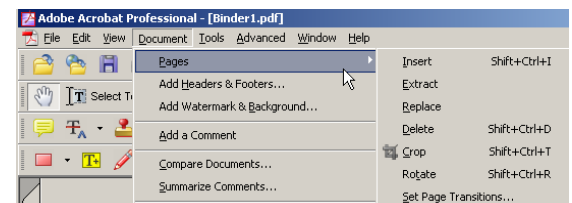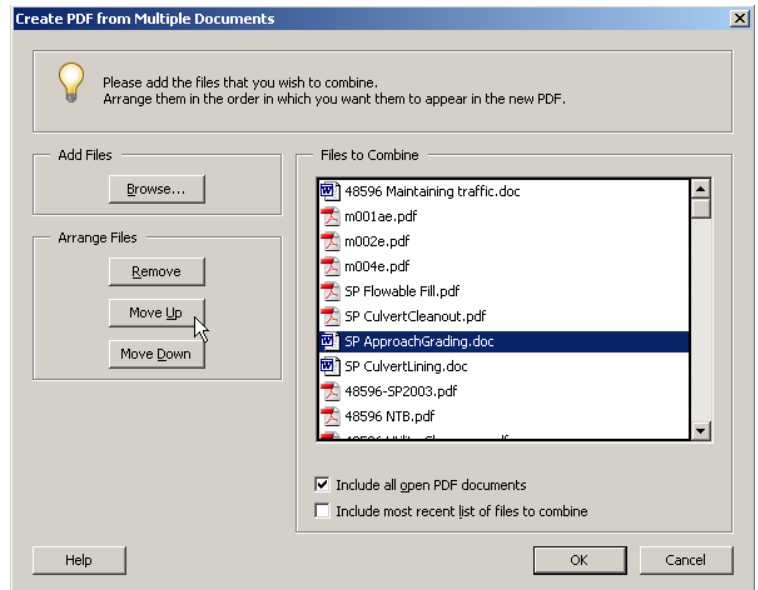
Viewing and modifying the pages in Adobe PDF: The PAGES side tab in Adobe will display thumbnails of the each page within the document for easier review. You can rearrange the pages by dragging and dropping the thumbnails into the order you want them.
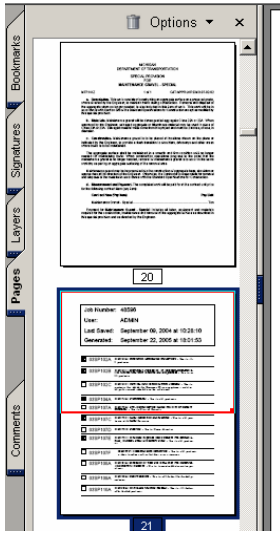
Making Adjustments:

Once the main file is created, minor modifications can be made to the order of the document but it is not recommended that extensive file reorganization be done using this method.

Insert Pages –. Click on Document, Pages, Insert, Select the file, Location: After, Page number you have highlighted should show in Page: box. Click on OK. Select First or Last to add to the beginning or ending of the document.

Delete Pages – Click on Document, Pages, Delete. If you only want to delete the page that's highlighted, use the Selected radio button or key in the page numbers in the From: and To: boxes. Click on OK.

Replace Pages– Click on Document, Pages, Replace, Select the file containing the pages you want to replace, enter what pages in the orginal are being replaced and what pages in the replacement file contain the pages you want. Click on OK. NOTE: Both files must have equal number of pages – otherwise delete the old pages and insert new pages.

Extract Pages - to create a new document– Click on Document, Pages, Extract, type in From: and To: Those pages will be extracted into a separate Adobe PDF file, and displayed with a name of [Pages from XXXXXX.PDF].

Your original will stay open also. That file can then be renamed and stored in a different location. Check the "Delete Pages After Extracting" if you do not want to retain them in the original document. Example: Use this to extract the checklist from the documents from SS/SP program.
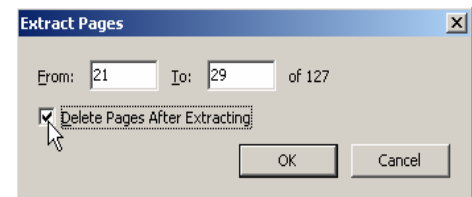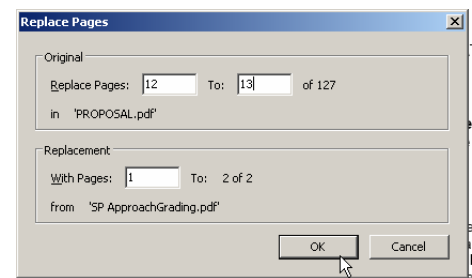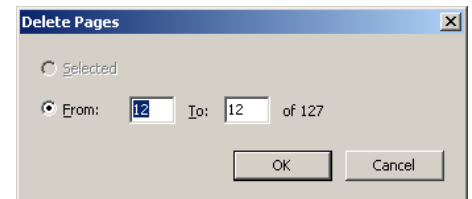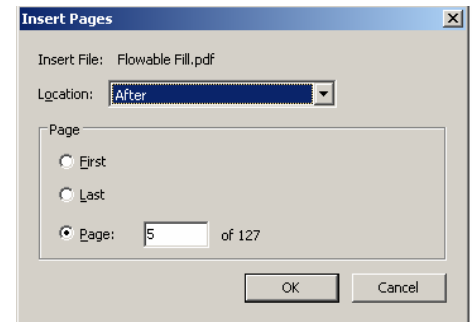
**Setting Bookmarks using the Table of Contents -Template –**
(NOTE: if included when combining your files. If not, obtain copy and insert BEFORE PAGE

1. The template is also the full reference document for bookmarking.)

1. On left side, click on Bookmark Tab to display default bookmarks.
2. Scroll through your document and locate the page (or first page of multiples) that corresponds to the bookmark,
3. Highlight the corresponding bookmark in the list, single right click and select Set Destination.
4. Locate the next page, repeating step 8 above until all pages that you contribute are bookmarked.
5. Reposition your SS/SP/NTB bookmarks to appropriate location by highlighting and dragging until you see the insert sub-bookmark symbol.
6. Delete only those bookmarks that don't apply to this project for your area of contribution, i.e. Permits, Watermain or Electrical Specification, etc.
7. Save Often to make sure you don't loose any.
8. DO NOT DELETE the bookmark template. It will be deleted by Finance prior to publishing.
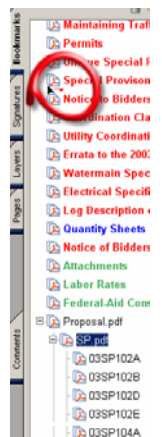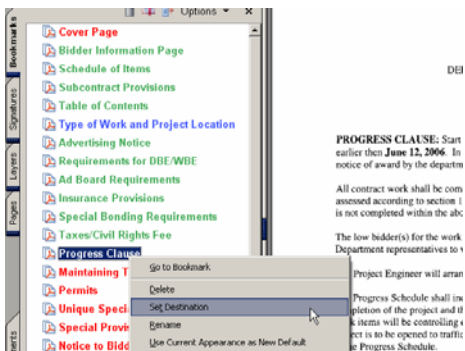
Documents Requiring Signatures -

- Electronic signatures ARE acceptable for signing all documents that DO NOT require an Professional Engineer's Seal.
- All documents requiring signature, with the exception of the Title Sheet, can and should be signed electronically.
- **If a project is designed by a consultant and contains a signed Professional Engineer's Seal, then it must be paper (not mylar) signed and sealed by consultant, signed by MDOT Project Manager/Design Engineer, scanned in and replaced in the plan set sized accordingly.** *See E-Proposal Reference Document: Scanned Title Sheet Replacement.pdf*
- The original printed title sheet should be stored as part of the project file in the TSC/Region file until project closeout.

**Adding Text, Comments, Crossing-Out or Highlighting– Using the Commenting Toolbar**
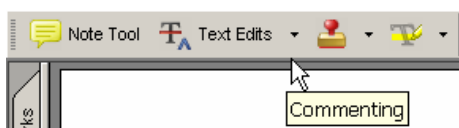
Adobe contains many tools which simulate what you currently do on paper. These tools can be utilized to:

- Add you signature stamp as outlined previously. On Commenting Toolbar, click on Stamp Tool.
- Leave a note- On Commenting Toolbar, Click on the Note Tool, type in your comment and a yellow speech balloon will be left as a bookmark at the location.
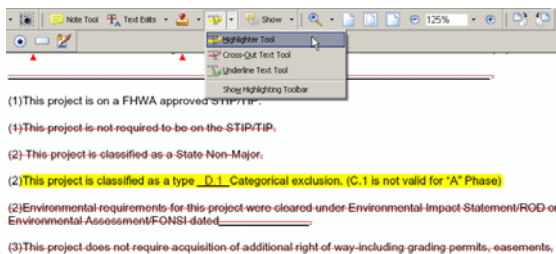
- Cross out or highlight Text- On Commenting Toolbar, Click on the Highlighter/CrossOut/Underline tool, select the tool and highlight the text you want to use it on.
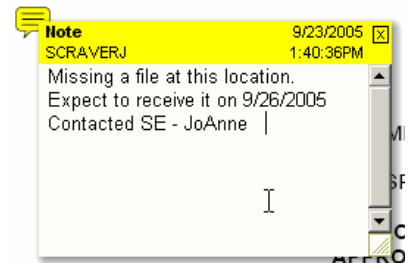
- Add Text (Date) – On Advanced Commenting Toolbar select Text Box Tool, draw box, type text. To format, single right click on box, select Properties, change fill to white, etc. To make default after adjusting, select, single right click and select Make Current Properties Default.
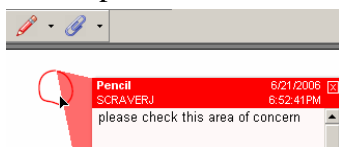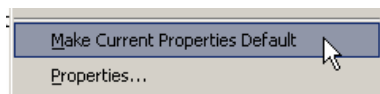
- Draw lines – On Advanced Commenting use the Pencil Tool to draw lines or make annotations for areas of concern or review

- Add a Shape – Simple drawing shapes can be added to emphasize a point.
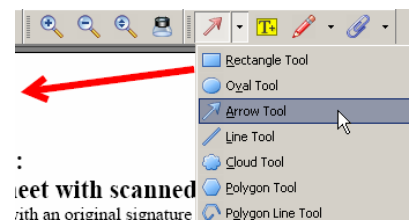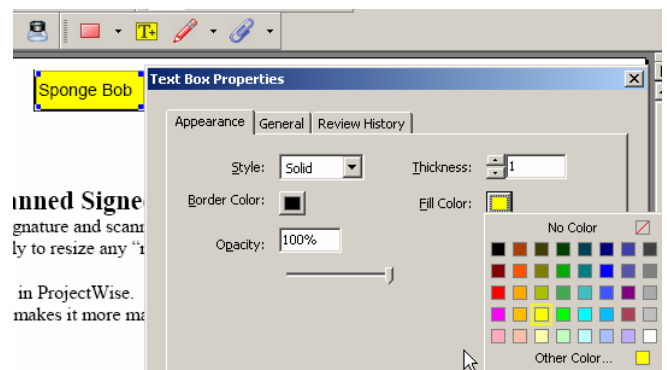
To read or reply to comments or annotations in the file, click on the Comments side tab which will bookmark

each note and display the messages typed
and allows you to add notes or reply to
comments. All comments are saved with the
file and can be saved using the Print
Comments, Create PDF of Comments
Summary.
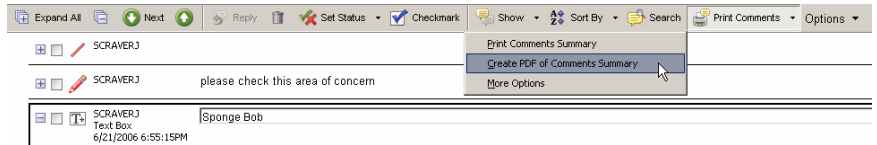
To print the comments, click on File, Print, under Print What: select
Document and Comments.

After all changes are made, to seal comments into document permanently,
extract the page, print the document to Adobe PDF, save it with a new
name and replace page in file. NOTE: Removes bookmarks, fillable
form, and text search capability so use sparingly.
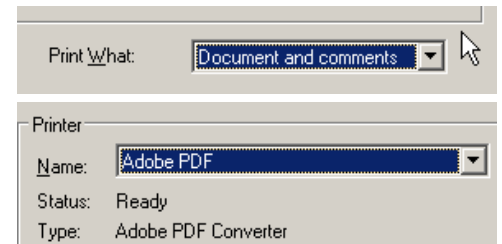
PROPOSAL is ready to turn in if:
1. Named PROPOSAL.PDF (No Other Name Accepted)
2. Complete containing all required documents.
3. In Proposal Submission Order
4. Located in the 6-Letting Plans and Proposal ProjectWise folder for the appropriate job number.
5. Any missing items have COMMENT NOTES and were previously discussed with Specs. & Estimates.
6. Has the state set to E-Proposal Complete.

If required, PLANS are ready to turn in if:
1. Named PLANHALF.PDF and PLANFULL.PDF respectively (No Other Names Accepted)
2. Each set complete containing all required plan sheets
3. In appropriate Plan Set Order matching the Title Sheet Index
4. Located in the 6-Letting Plans and Proposal ProjectWise folder for the appropriate job number.
5. Each have a state set to E-Proposal Complete.

Supporting Documents folder is ready to turn in if:
1. All Supporting documents are in PDF format
2. All Supporting documents are named distinctively to distinguish what they are. (See suggested naming
    conventions previous outlined.)
3. Located in the 6-Letting Plans and Proposal, Supporting Documents subfolder.
4. Each have a state set to E-Proposal Complete Supporting Documents.

This project, following final review will be fully electronic and available for viewing or download by registering at:

http://mdotwas1.mdot.state.mi.us/public/eprop/login/index.cfm

Register using the New User Registration button and a password will be emailed back to you.

NOTE: This is not to restrict access but to track users so information can be sent on updates or changes.

OR From the Bid Letting site –

Under Bid Information, Electronic Proposals: click on the SIGN IN and register as a new user.

Use the links to OPEN or SAVE the documents for personal use or reference.

MDOT employees can also access all E-Proposal projects by using ProjectWise and searching for the Job Number or name of Proposal.PDF.

PROPOSAL SUBMISSION ORDER
Dated 9/26/2005

Type of Work and Project Location - *(Fillable form located at website.)*
Progress Clause
Maintaining Traffic Special Provision (including Special Details)
Permits *(Scanned copies)*
- DEQ
- MDOT
- Army Corp of Engineers
Unique Special Provisions (Place in order to match Trns*port)
03SP (Special Provisions) – *(Extract checklist from package and put in Supporting Documents folder)*
03NTB (Notice to Bidders) – *(Extract checklist from package and put in Supporting Documents folder)*
- Report Form
- Insurance (Rest Area Insurance)
- Certified Payrolls
- Bid Rigging
- Mandatory Electronic Bidding
- Warranty Information
- Multiple Warranties
- Yellow Warning Signs
- Asbestos Metro Only
- Landscaping
- Traffic Signal Timing Permit
- Railroad
Coordination Clause
Railroad Coordination Clause
Utility Coordination
Railroad Special Provisions
Supplemental Specifications (Place in numeric order) - *(Extract checklist from package and put in Supporting Documents folder)*
Watermain Special Provisions
Sewer Special Provisions (Sanitary) and Sanitary Drainage Structures
Electrical Special Provisions
Traffic, Signals, Detector Loops Special Provisions
Pump House Special Provisions
Rest Area Special Provisions
Building Special Provisions
Log
- Title Sheet
- Project
- Note Sheet
- General Notes
- Utilities
- Standard Plan List
- Typical Sheet
- Miscellaneous Detail Sheet
- Plan Sheets
- Staging Plans
- Soil Borings and Pavement Cores
- Special Details Sheets
Notice to Bidders Contact Person (e-mail address, fax and telephone numbers) – *Fillable form available at Plan Development web page.*